

Knowledge management: Where foundations in Europe stand and where they want to go - Results of a survey on knowledge management, April 2004

1. Why this survey?

Foundations are traditionally in the philanthropy business. In recent years however there has been an ever stronger consciousness that foundations are also in the knowledge business. While making grants, they do research, evaluations, follow up, networking and more ... A future challenge for foundations lies in creating impact on society through knowledge sharing and knowledge development in exchange with society.

Concretely, what is this about? It is about:

- knowing what interesting projects there are in your domain
- creating networks to learn from each other
- sharing with others the useful bits of your files
- bringing your grantees together so they can learn from each other ...

The following is one formal definition, among many, of knowledge management: "Knowledge management comprises the activities focused on the organisation of gaining knowledge from its own experience and from the experience of others, and on the judicious application of that knowledge to fulfil the mission of the organisation.

These activities are executed by marrying technology, organisational structures, and cognitive based strategies to raise the yield of existing knowledge and produce new knowledge."

Within this domain the survey was launched at the EFC Annual General Assembly (AGA) and Conference in Lisbon in 2003, for various reasons:

- the questions in themselves provoke thinking about one's own foundation
- through the results it will become clear whether foundations are concerned about the subject or not, where they stand and where possible priorities lie
- the priorities that come forward will be taken into consideration by the EFC staff to drive their projects forward

2. Structure of the survey and response

Three questions

The survey consisted of three main questions. The first question handles the interpretation of the term knowledge management: what is your foundation's key objective in knowledge management? The second question handles aspects that come into play in knowledge management, such as the existence of a strategy, the openness of the culture, the processes of quality control of data, the content that is being managed, and the functioning of communities of practice. These aspects are assessed in their current situation and it is also asked where the future priorities lie. The third question finally examines which tools foundations use and how well they are appreciated and also where the priorities for the future are.

Response

The survey was available at the EFC AGA and Conference in Lisbon in 2003 and then online at the EFC website. In total 120 answers were received. After a quality check on completeness of the answers and reliability of the mail address, 56 answers were retained representing some 40 different foundations. Some larger foundations provided more than one completed survey. This survey does not claim to be representative for the European foundation sector - its only ambition is to identify some tendencies that are present among foundations in the field of knowledge management.

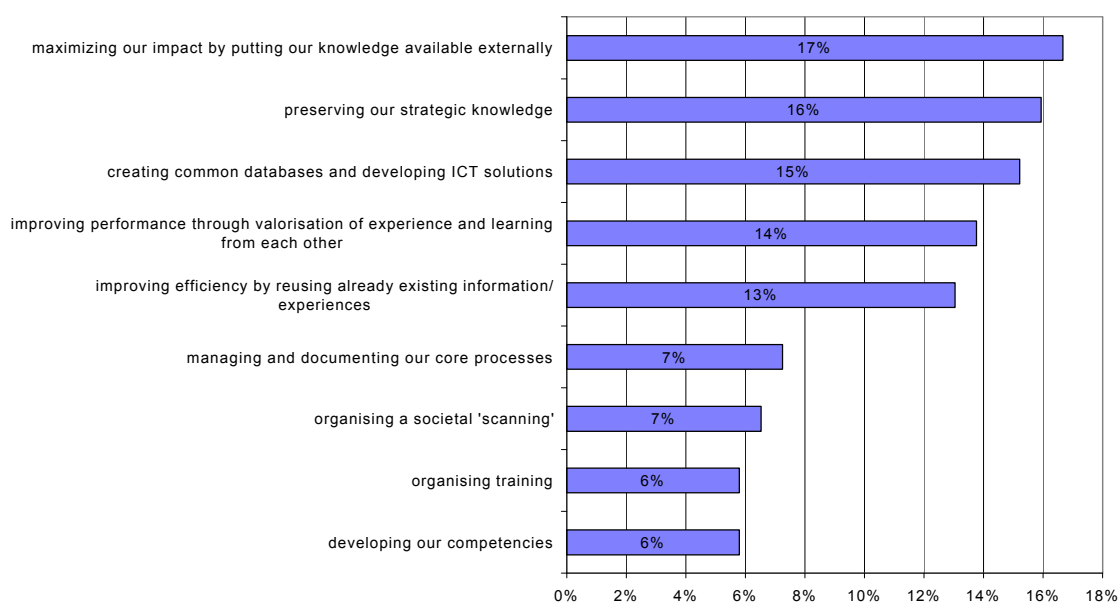
3. Where foundations stand and where they want to go

3.1. The priorities for knowledge management

In this question respondents were asked to identify the three main priorities of knowledge management in their foundations. The analysis represents the % scores attributed, not the % of foundations that responded.

Knowledge management in my foundation is about:

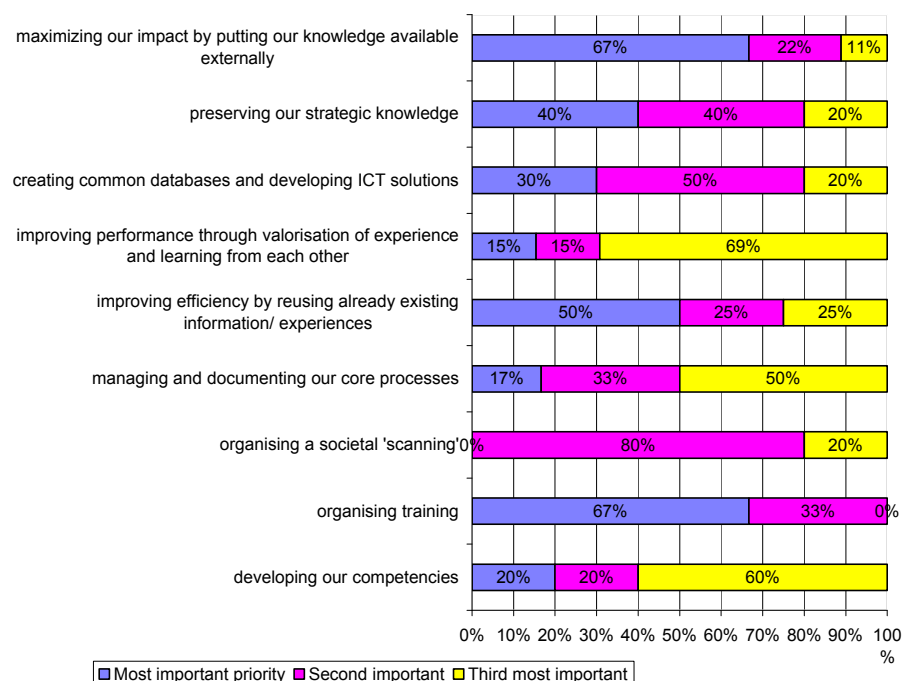
Scores:



When asking where the priorities lie for knowledge management, the survey found that the external orientation and impact on society comes first.

This priority however is part of a larger cluster that also comprises the preserving of strategic knowledge, the link with ICT and improvement of performance and efficiency. Respondent foundations in Europe clearly have a strategic view on knowledge management. A cluster of more operational elements such as documenting and training are not considered a priority.

Priorities were set by attributing a score from 3 to 1. The following graph indicates how important these priorities are to the respondent's foundation.



These figures confirm the importance of increasing impact and orienting knowledge management towards making knowledge available externally. The efficiency that can be achieved by re-using existing information also comes out in the responses.

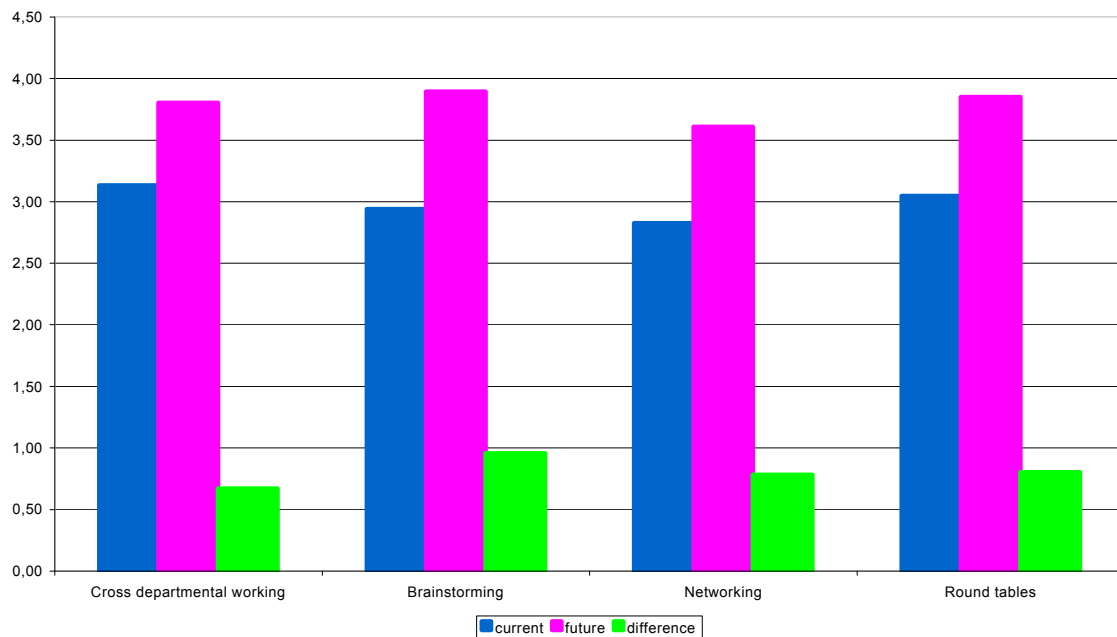
Learning from each other is considered important but not as the highest priority. Developing our competencies scores weakest on the scales.

3.2. The focuses for the future

In this part, twenty two different questions were asked. These ranged from having a strategy, to organising workshops and using templates. Respondents were asked to evaluate the current performance and to express the wish to strengthen the mentioned point in the future.

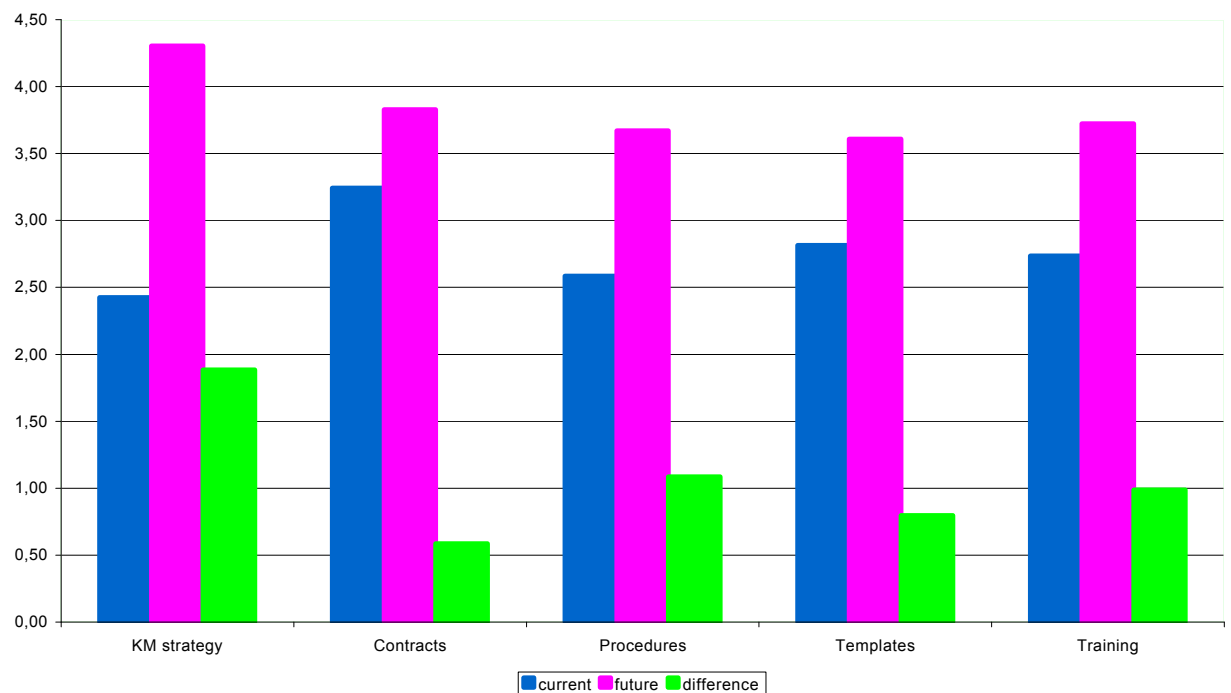
The answers to the questions are grouped under three themes: the way of working, the internal organisation, the contents desired. The answers are scored on a scale of one (bad) to five (excellent and top priority), representing the current and future situations.

A first series of questions concerning the **way of working**.



On average, the foundations are quite content with their way of working. There are cross departmental meetings; brainstorm techniques are used internally; through networking grantees are put into contact with one another; other foundations are being visited and contact information is shared; and new projects can be identified by organising round tables. The intentions for the future are to improve on these aspects but none stands out as a special focus.

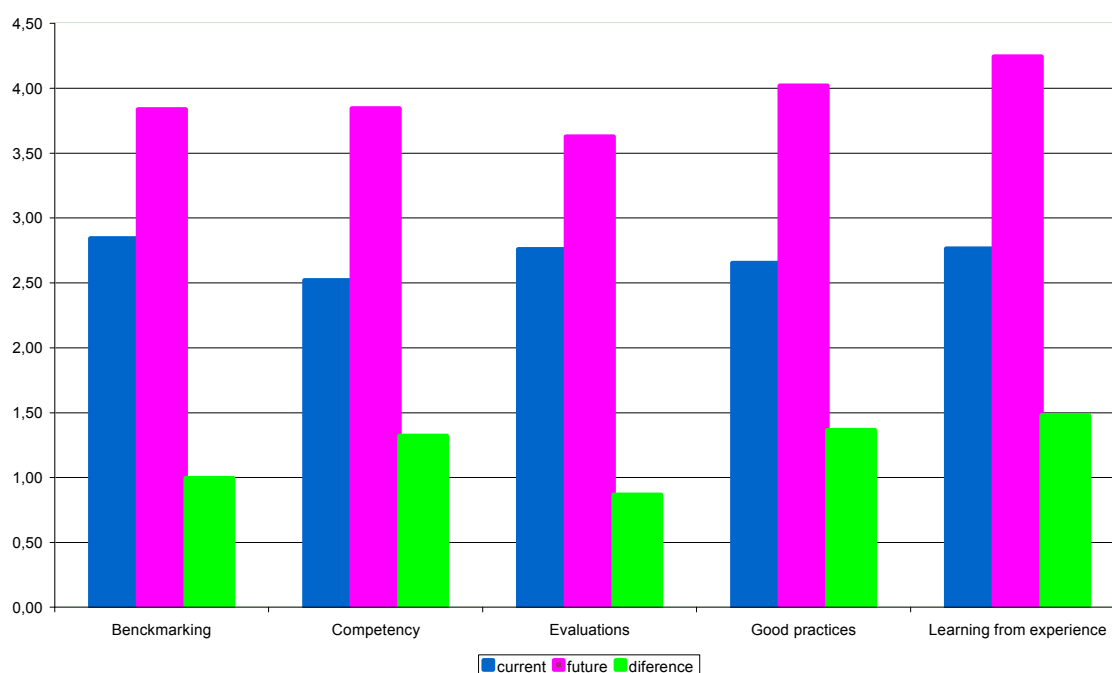
When looking at aspects of **internal organisation**, the following tendency comes forward:



The need for formulating an overall strategy for knowledge management comes forward very strongly.

Most respondents' foundations produce an overview of all grantee contracts, and use templates for grants and project management. In general, respondents were happy with their foundation's approach to staff training. A slight point of attention concerns procedures. This concerns specific procedures on validating the quality of data on the one hand and on having all procedures easily accessible to all.

Finally some questions concerned the **content** that foundations currently focus on and wish to in the future:



Competencies, good practices and learning from experience come forward as the 'knowledge rich' contents that foundations are setting as a priority for the future.

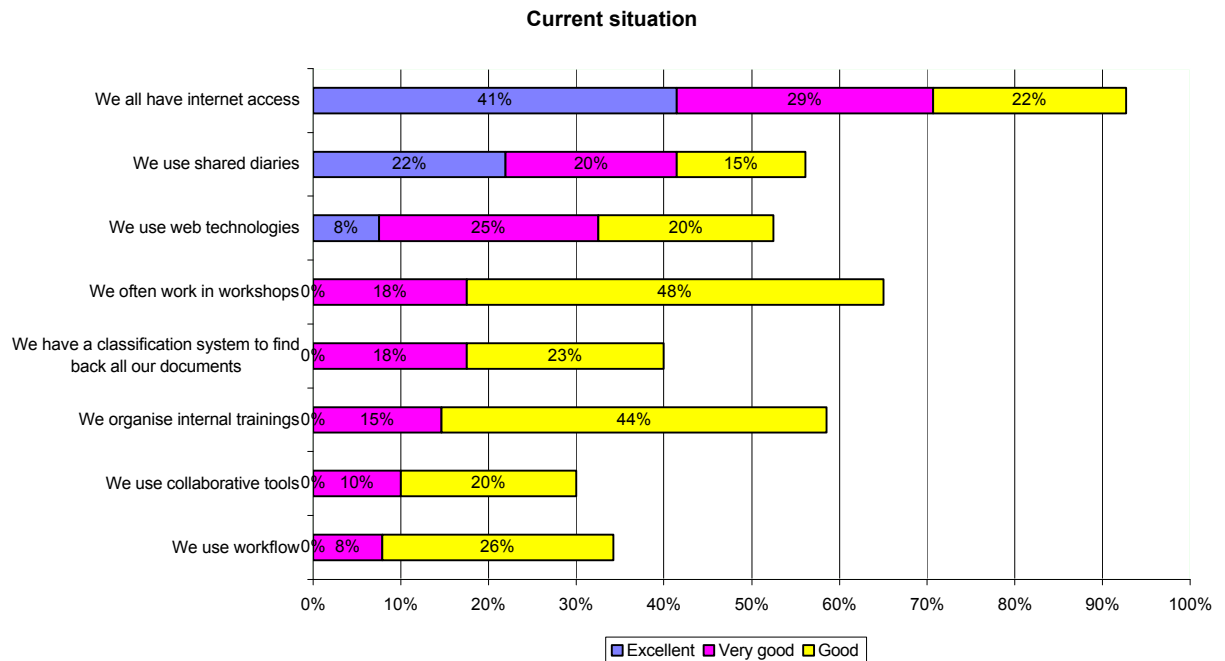
The competencies mentioned here are 'knowing who does what in other foundations'. Whereas in question one, developing competencies internally was not mentioned as a priority for knowledge management, knowing the competencies of others outside the foundation is considered important. This confirms the external orientation of foundations which also came forward in the first question.

The exchange of good practices with other foundations are also considered a point for improvement as well as 'learning from experiences'. The more formal evaluations of grants and projects are not a major focus for improvement. Learning from experience however is to be considered as more informal, allowing foundations to easily talk about mistakes and learn from them. This openness on mistakes is also an element of an open learning culture.

3.3. The tools that are used and appreciated

When investigating which tools are used and how they are appreciated, respondents rated the efficiency of their foundations from good to excellent in the following categories:

(% of the respondents)

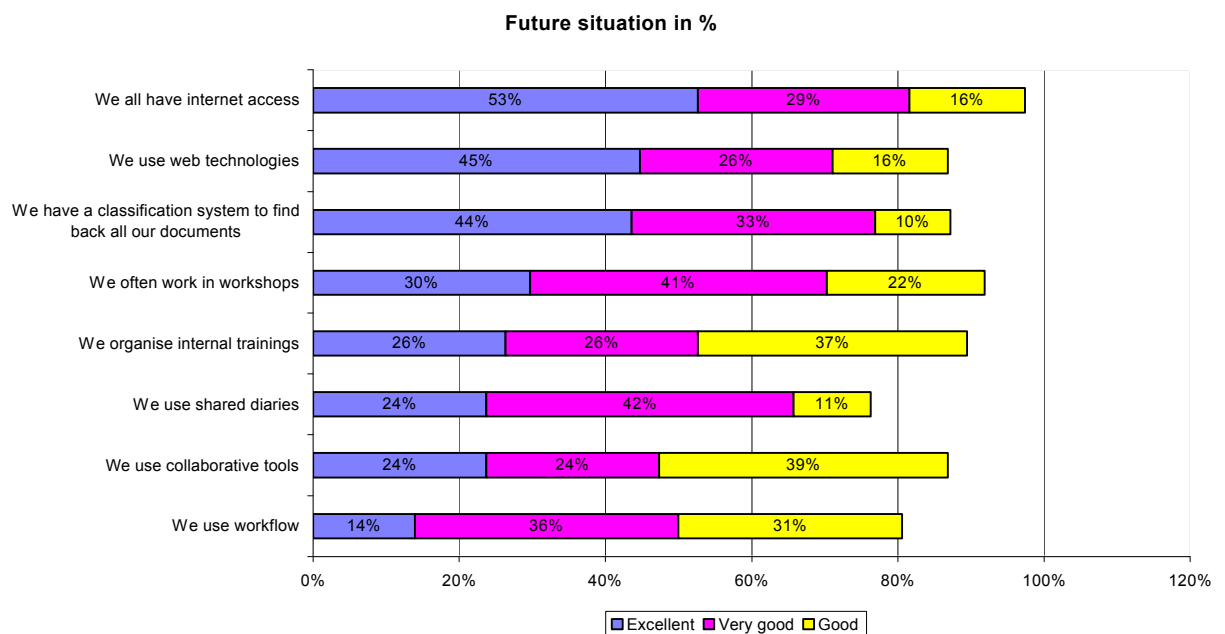


Foundations clearly are enthusiastic internet users. All have access, use it and most consider it a very good tool. The use of shared diaries is also very common and much appreciated. A small group (8%) consider the use of web technologies: intranet, search engines, excellent and efficient and most consider these good.

Using workshops as a way of working and organising internal trainings are a common practice in foundations although it is admitted that these do not belong to the category of tools that work *extremely* efficiently, but they are appreciated as good and very good.

Striking is that only 41% of the respondents consider their classification system for documents to be good, implying that the majority considers it to be rather weak.

When looking at the priorities and intentions for the **future**, it is evident that foundations wish to improve on all the tools that are mentioned.



Some major shifts compared to the current situation can be found in the wish to work on a better classification system to find back documents. Also the wish to use collaborative tools such as virtual meeting rooms, extranet, ... comes forward as a future focus.

4. Conclusions

- The foundations that responded to the survey clearly have a strategic view on knowledge management and consider a priority to be making knowledge available externally for maximising the foundations' impact.
- A focus for improvement in the internal organisation is to formulate a clear strategy. From a contents point of view, there is a wish to exchange good practices with other foundations and learn more from their own and others' mistakes.
- The competencies present in other foundations are a subject for information exchange and knowledge sharing.
- The use of the Internet and shared diaries is common practice and scores high on satisfaction. An important attention point for the future is better document management.
- Possible results of this survey could be to organise exchange of good practices and lessons learned between foundations on both strategy formulation and document management. Also to be considered is to create a 'who knows what' structure exchange / database on a European level.

Reactions:

If you wish to react to this article and the conclusions, please e-mail **km@efc.be**
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